

# State of Tennessee

Department of Education



*In response to*  
**RFP #33150-02211**

## QUALIFICATIONS EVIDENCE FOR RFP #33150-02211

Kristen McKeever  
RFP Coordinator

Tennessee Dept. of Education  
6<sup>th</sup> Floor Andrew Johnson Tower  
710 James Robertson Parkway  
Nashville, TN 37243



## P-12 LDS - Early Warning System

*Respectfully Submitted June 1, 2011 by Choice Solutions, Inc.*

### QUALIFICATIONS EVIDENCE GUIDE

The Proposer must address all items detailed below and provide, in sequence, the information and documentation as required (referenced with the associated item references). The Proposer must also detail the proposal page number for each item in the appropriate space below, and use this guide to cover the Qualifications Evidence section of the proposal (as its table of contents).

Prior to State evaluation of Qualifications Evidence, the RFP Coordinator will review each proposal for compliance with all RFP requirements, including but not limited to:

- The proposal must be delivered to the State no later than the Proposal Deadline.
- The Qualifications Evidence and the Cost Proposal must be packaged separately as required.
- The Qualifications Evidence must NOT contain cost or pricing information of any type.
- The proposal must NOT contain any qualification, limitation, or other restrictions.

The Proposal Evaluation Team will, then, review the Qualifications Evidence to determine if the mandatory requirement items are addressed as required and that it documents that the Proposer meets each mandatory qualification and experience requirement and is otherwise, at least, minimally acceptable as a contractor for the subject services.

<b>PROPOSER LEGAL ENTITY NAME:</b>		Choice Solutions, Inc.
<b>Proposal Page #</b> (Proposer completes)	<b>Item Ref.</b>	<b>QUALIFICATIONS EVIDENCE</b>
1	<b>6.2.1.</b>	Detail the name, e-mail address, mailing address, telephone number, and facsimile number of the person the State should contact regarding the proposal.
2 – 3	<b>6.2.2.</b>	Provide the RFP Attachment 6.1., <i>Proposal Statement of Certifications and Assurances</i> completed and signed by an individual empowered to bind the Proposer to the provisions of this RFP and any resulting contract. The document must be signed without exception or qualification.
4	<b>6.2.3.</b>	Provide a statement, based upon reasonable inquiry, of whether the Proposer or any individual who shall perform work under the contract has a possible conflict of interest (e.g., employment by the State of Tennessee) and, if so, the nature of that conflict.  <i>Any questions of conflict of interest shall be solely within the discretion of the State, and the State reserves the right to reject any proposal or cancel any award.</i>
5	<b>6.2.4.</b>	Provide a statement of whether the Proposer or, to the Proposer's knowledge, any of the Proposer's employees, agents, independent contractors, or subcontractors, proposed to provide work on a contract pursuant to this RFP, have been convicted of, pled guilty to, or pled <i>nolo contendere</i> to any felony. If so, include an explanation providing relevant details.  <i>Any issues relating to such a matter shall be solely within the discretion of the State, and the State reserves the right to reject any proposal or cancel any award.</i>
6	<b>6.2.5.</b>	Provide a statement of whether there is any material, pending litigation against the Proposer that the Proposer should reasonably believe could adversely affect its ability to meet contract requirements pursuant to this RFP or is likely to have a material adverse effect on the Proposer's financial condition. If such exists, list each separately, explain the relevant details, and attach the opinion of counsel addressing whether and to what extent it would impair the Proposer's performance in a contract pursuant to this RFP.  <i>Any issues relating to such a matter shall be solely within the discretion of the State, and the State reserves the right to reject any proposal or cancel any award.</i>  <i>All persons, agencies, firms, or other entities that provide legal opinions regarding the Proposer must be properly licensed to render such opinions. The State may require the Proposer to submit proof of such licensure detailing the state of licensure and licensure number for each person or entity that renders such opinions.</i>
7 – 11	<b>6.2.6.</b>	Provide evidence that the Proposer is a Microsoft Certified Partner.
12 – 18	<b>6.2.7.</b>	Provide evidence that the Proposer has previously implemented their data model in a K-12 Local Education Agency or State Education Agency.

## Qualifications Evidence

### Item Ref. 6.2.1

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Detail the name, e-mail address, mailing address, telephone number, and facsimile number of the person the State should contact regarding the proposal.

### Response

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The person from Choice Solutions, Inc., that the State of Tennessee should contact regarding this proposal is as follows:

<b>Name:</b>	Zachary Tussing
<b>Title:</b>	Vice President
<b>Email Address:</b>	<a href="mailto:ztussing@choicep20.com">ztussing@choicep20.com</a>
<b>Mailing Address:</b>	Choice Solutions, Inc. 420 Lakeside Ave. Ste. 101 Marlborough, MA 01752
<b>Telephone Number:</b>	(508) 229-0044
<b>Facsimile Number:</b>	(508) 229-0033

### Item Ref. 6.2.2

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Provide the RFP Attachment 6.1., *Proposal Statement of Certifications and Assurances* completed and signed by an individual empowered to bind the Proposer to the provisions of this RFP and any resulting contract. The document must be signed without exception or qualification.

### Response

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The signed and completed *Proposal Statement of Certifications and Assurances* can be found on the following page.

**PROPOSAL STATEMENT OF CERTIFICATIONS AND ASSURANCES**

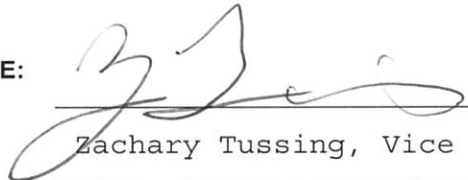
An individual legally empowered to contractually bind the Proposer must sign and complete the *Proposal Statement of Certifications and Assurances* below as required, and this signed statement must be included with the proposal as required by the RFP Attachment 6.2.

**The Proposer does, hereby, expressly affirm, declare, confirm, certify, and assure ALL of the following:**

1. The Proposer will comply with all of the provisions and requirements of the RFP.
2. The Proposer will provide, for the total contract period, all services defined in the Scope of Services specified by the *Pro Forma Contract* attached to the RFP.
3. The Proposer accepts and agrees, without qualification, to all terms and conditions set out by the *Pro Forma Contract* attached to the RFP.
4. The Proposer acknowledges and agrees that a contract resulting from the RFP shall incorporate, by reference, all proposal responses as a part of the contract.
5. The Proposer will comply, as applicable, with:
  - (a) the laws of the State of Tennessee;
  - (b) Title VI of the federal Civil Rights Act of 1964;
  - (c) Title IX of the federal Education Amendments Act of 1972;
  - (d) the Equal Employment Opportunity Act and the regulations issued there under by the federal government; and,
  - (e) the Americans with Disabilities Act of 1990 and the regulations issued there under by the federal government.
6. To the knowledge of the undersigned, the information detailed within the proposal submitted in response to the RFP is accurate.
7. The proposal submitted in response to the RFP was independently prepared, without collusion, under penalty of perjury.
8. No amount shall be paid directly or indirectly to an employee or official of the State of Tennessee as wages, compensation, or gifts in exchange for acting as an officer, agent, employee, subcontractor, or consultant to the Proposer in connection with the RFP or any resulting contract.

*By signature below, the signatory certifies legal authority to bind the proposing entity to the provisions of this RFP and any contract awarded pursuant to it. The State may, at its sole discretion and at any time, require evidence documenting the signatory's authority to legally bind the proposing entity.*

**PROPOSER SIGNATURE & DATE:**

 5/26/2011

**PRINTED NAME & TITLE:**

Zachary Tussing, Vice President

**PROPOSER LEGAL ENTITY NAME:**

Choice Solutions, Inc.

**PROPOSER FEIN or SSN:**

FEIN #043-503111

### **Item Ref. 6.2.3**

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Provide a statement, based upon reasonable inquiry, of whether the Proposer or any individual who shall perform work under the contract has a possible conflict of interest (e.g., employment by the State of Tennessee) and, if so, the nature of that conflict.

### **Response**

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Neither Choice Solutions, Inc., nor any individual who shall perform work under the contract, has a possible conflict of interest.

#### Item Ref. 6.2.4

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Provide a statement of whether the Proposer or, to the Proposer's knowledge, any of the Proposer's employees, agents, independent contractors, or subcontractors, proposed to provide work on a contract pursuant to this RFP, have been convicted of, pled guilty to, or pled *nolo contendere* to any felony. If so, include an explanation providing relevant details.

#### Response

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Neither Choice Solutions, Inc., nor, to Choice Solutions' knowledge, any of Choice Solutions' employees, agents, independent contractors, or subcontractors, proposed to provide work on a contract pursuant to this RFP, have been convicted of, pled guilty to, or pled *nolo contendere* to any felony.

### Item Ref. 6.2.5

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Provide a statement of whether there is any material, pending litigation against the Proposer that the Proposer should reasonably believe could adversely affect its ability to meet contract requirements pursuant to this RFP or is likely to have a material adverse effect on the Proposer's financial condition. If such exists, list each separately, explain the relevant details, and attach the opinion of counsel addressing whether and to what extent it would impair the Proposer's performance in a contract pursuant to this RFP.

### Response

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There is no material, pending litigation against Choice Solutions, Inc. that Choice Solutions, Inc. should reasonably believe could adversely affect its ability to meet contract requirements pursuant to this RFP or is likely to have a material adverse effect on Choice Solutions' financial condition.



### Item Ref. 6.2.6

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Provide evidence that the Proposer is a Microsoft Certified Partner or a member of the Microsoft Partner Network.

### Response

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Choice Solutions is both a Microsoft Certified Partner and a member of the Microsoft Partner Network.

Choice Solutions is a Microsoft® Gold Certified Partner. The endorsement letter proclaiming such can be found on the following page.

Choice Solutions is also a member of the Microsoft Partner Network. Our Partner Network ID number is 2521204. A copy of the email letter confirming our membership, as well as a screen shot from the portal showing our company name and ID, can be found at the end of this section, on the pages after the Microsoft Gold Certified Partner endorsement letter.



**Choice Solutions is a Microsoft® Gold Certified Partner for Advanced Infrastructure Solutions, Information Worker Solutions, Networking Infrastructure Solutions**, which means that they have demonstrated superior levels of successful implementations, capabilities and certification. Microsoft Gold Certified Partners are required to meet rigorous requirements for certification and expertise. Choice Solutions has reached the status of Gold Certified Partner for Advanced Infrastructure Solutions, Information Worker Solutions, Networking Infrastructure Solutions by demonstrating increased levels of developer certification, deep real-world experience, and by providing completed customer reference projects that were independently verified by Microsoft.

Through engagement with Microsoft, Microsoft Gold Certified Partners have in-depth access to a variety of exclusive resources and early product information. Resources include priority access to a support team of Microsoft certified systems engineers, non-disclosure evaluation of new products and technologies, as well as planning tools and events to keep up to speed on the latest Microsoft product developments and future direction.

Choice Solutions employs Microsoft Certified Professionals (MCPs); individuals who have passed certification exams designed to validate their mastery using Microsoft tools and technologies. A recent study of Microsoft Certified Systems Engineers (MCSEs) and their supervisors by Jack McKillip, Ph.D. at Southern Illinois University, rated MCPs as highly effective workers on the job and IT supervisors rated MCSEs as more competent on all global dimensions as compared to non-certified systems engineers. Be sure to ask for a MCP on your next project.

This year Microsoft will continue to invest in certification and enhanced resources and support for Microsoft Gold Certified Partners as part of our ongoing commitment to provide customers with choice and best of breed product solutions via Microsoft Gold Certified Partner companies such as Choice Solutions.

Sincerely,

A handwritten signature in black ink, reading "Allison L. Watson". The signature is fluid and cursive, with a long, sweeping underline.

Allison Watson  
Vice President – Partner Sales and Marketing Group  
Microsoft Corporation

**From:** Microsoft [<mailto:Microsoft@e-mail.microsoft.com>]  
**Sent:** Wednesday, April 27, 2011 2:43 PM  
**To:** [brennain.delaney@choicep20.com](mailto:brennain.delaney@choicep20.com)  
**Subject:** Welcome Back to the Microsoft Partner Network

Visit the Microsoft Partner Network Portal



**Microsoft** Partner Network™

Dear Microsoft Partner,

Thank you for continuing your Microsoft Partner Network membership.

**You + Competency + Microsoft Partner Network = Competitive Advantage**

There are opportunities for business of all sizes within the partner network, making it important to familiarize yourself with the various [membership opportunities](#). For IT generalists, consider ordering a subscription and joining the Small Business Specialist Community to learn how to build new business offerings. For service providers, resellers or software developers focused on midmarket and enterprise customers, consider one or more Microsoft competencies that will showcase your proficiency. Attaining either a silver or a gold competency conveys your Microsoft technology expertise and gives you a truly powerful competitive advantage. Competencies demonstrate the high degree of excellence your company has achieved.

Please note that your **organization ID number is still 2521204**. You'll need to use this number to access your exclusive benefits on the Microsoft Partner Network portal.

**Your next steps:**

- Review [membership benefits](#)
- Visit the [My Membership page](#) to:
  - Manage your account
  - Advertise your business

- View your dashboard (key metrics on your capability, sales pipeline, and more)
- Read your newsletter

Thank you for your continued partnership and support in delivering Microsoft technologies to our mutual customers.

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You are receiving this informational e-mail as part of the services agreed to under your Microsoft Partner Network membership.

To update your profile and view your membership details sign in to the [Microsoft Partner Network Portal](#) and click on View your Membership Account.

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One Microsoft Way  
Redmond, WA, USA  
98052

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**Microsoft**

# Microsoft Partner Network

Choice Solutions Inc

Organization Partner ID: 2521204 [Active]

Home Membership Status Requirements & Assets Organization Information Orders & Benefits Administration

Home

Signed in as Delaney, Brennain

Home

Location:

Choice Solutions Inc (Organization)

Primary Program Contact: Delaney Brennain  
Organization Partner ID: 2521204

Address: 420 Lakeside Ave  
Marlborough, Massachusetts, 01752-4571  
United States  
Phone:

## Item Ref. 6.2.7

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Provide evidence that the Proposer has previously implemented their data model in a K-12 Local Education Agency or State Education Agency.

## Response

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### About Choice Solutions

Choice Solutions is a full service system integration and software development firm, focused on the needs of P-20 education clients. Over the past decade we have implemented SLDS solutions within 11 SEA clients, as well as many LEAs. Currently, we are the leading SLDS provider and are working in tandem with our clients and partners to extend our data management and decision support solutions to meet your ever growing needs. We are working on several cutting edge initiatives with our states including Student-Teacher-Course Linking, National Education Data Model, State Core, Growth Model, Balanced Score Card, and EDFacts reporting, and are working to share that work with our clients through our community of practice.

The edFusion Solution contains the following components:

- edFusion
  - Portal
  - Directory/Identity Management
  - Data Warehouse
  - Reporting
  - Unique ID Solutions
  - PreK Information Systems
  - Public Schools Information System
  - At Risk Management Tools

### Early Warning System Experience

Choice Solutions has designed, developed, and implemented a longitudinal data warehouse and reporting infrastructure for the Maine Department of Education. Complete with decentralized security for local entities, custom and ad-hoc reports, dashboards, and utilities are available to particular constituencies and the public. Embedded within this delivery are spoked data marts for Growth Model, At-Risk-Management, Balanced Scorecard, and EDFacts. Similarly, the tool is being fashioned for use by the Wyoming Department of Education to remediate deficiencies in assessment benchmarks. Focal strengths of the toolset already in place at WY are collaborative features and communities established to enable more effective communication and collaboration on at risk populations.

The At-Risk Management and Dropout Warning Tool, supplied by our branded Influence Spectrum Management (ISM) tool, is designed to plug-n-play with the enterprise directory and roster management from local or statewide services/products. Featuring customization of research-based models to stem Dropout, this tool capitalizes on an existing or Choice's code Data Warehouse products, and provides stakeholders from family and community through LEA and/or SEA administration and researchers with access to allowable data regarding various student domains (engagement, behavior, performance, etc) in aggregate or individual form.

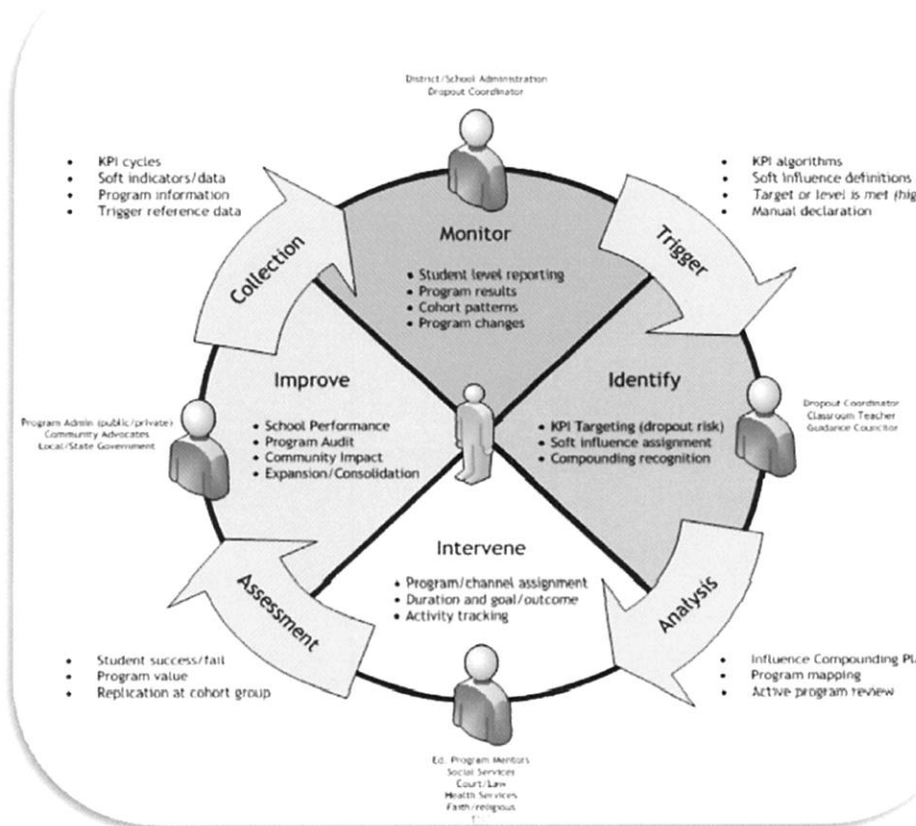


The ISM and At-Risk platform supports program and intervention assignment, including the use of digital library items such as Course/Unit/Lesson and learning resources and alignment to local, state, or national standard frameworks and expectations. The core of the ISM and At-Risk tool leverages key performance, characteristic indicators, and other data to produce dropout warning levels with alert/notification features that enable and support action in the classroom or alternative intervention setting. With supporting and positive reinforcing factors, this tool also allows for highly differentiated experience, parent involvement, and critical observation and response methods to take root.

## Influence Spectrum Management -

The US education system faces many challenges, including how to reduce dropout rates, improve graduation rates, and improve early literacy and overall student performance to ensure post-secondary completion. A data management component we have recently developed is the Influence Spectrum Management (ISM) module, which was developed specifically to aid in the management and identification of at-risk trends.

ISM answers the industry's need for an extensible, web-based solution that identifies real-time risk and accelerated learning patterns, manages interventions and enrichment programs, and tracks goals and successes. Our solution focuses putting actionable data in the hands of teachers and administrators on a timely basis.



**ISM for Dropout-** ISM will blend student key performance indicators with soft influences, such as family and community, to create predictive outlooks and intervention recommendations. Aggregate reports and alerts will influence programming and planning while ISM pinpoints student growth potential as well as building school, family, and community strength. The ISM will alert Staff by providing a dropout





warning. The dropout warning will allow Staff to do each of the following:

- Identify students in or trending towards high risks in known areas including but not limited to attendance, absenteeism, dropout, graduation, literacy, and classroom performance, benchmarks, and summative assessments;
- Intervene and plan remediation through a variety of avenues for students deemed at risk;
- Reduce overall school and district dropout rates;
- Determine/rate success factors for programs;
- Assist accelerated students with enrichment programs and activities;
- Establish threshold based alerts to users who can impact outcomes;

#### **Prescribed or Ad Hoc Data collections**

One of the most critical aspect of any data system is the ability to collect additional data as demand, internal or external, requires. It is our experience that the sometimes adversarial relationship between LEAs and SEAs as it relates to data can be eliminated once the LEA users actually see meaningful outputs. Providing the ability for LEA users to input additional data into can greatly impact how meaningful the reports are for that district. By providing an open platform you or vendor can create those data entry applications which will result in better data to impact outcomes.

#### **Platform for Growth**

Our focus is on creating a solution that for the integration of various applications as well as the ability to develop and integrate additional modules on top of the existing framework. Systems change, and by having a solution that can adapt with those changes will help to provide the resources and tools then next generation of users will demand.

## Client References

Maine Department of Education	
<b>Name of Project</b>	Maine Enterprise Data Warehouse and Decision Support System - Maine Department of Education
<b>Project Scope</b>	Choice Solutions is implementing an enterprise education data warehouse and decision support solution, which is the foundation for Maine's longitudinal data strategy. The solution includes a robust set of data extractions from approximately 30 source systems, over 1,000 SEA-specific reports, a complete zero-client ad hoc reporting solution as well as several state specific data marts for state/federal reporting, drop-out prevention, and growth model.
<b>Project Narrative</b>	2007 SLDS award winner to implement enterprise education data system and decision support system for both public and private views of data. Includes 29 source data systems aggregated into a single data warehouse and multiple data marts.
<b>Specific Deliverables</b>	<ul style="list-style-type: none"> <li>• Architect, design, and deploy enterprise education data warehouse</li> <li>• Developed an early warning system data mart to track at-risk students</li> <li>• Design various users sites and views</li> <li>• Implemented state and federal reporting data marts</li> <li>• Establish RBAC enterprise directory for security and provisioning</li> </ul>
<b>Start/End Date</b>	2010 - present
<b>Web site for viewing</b>	The website is not public yet but should be within the next few weeks
Reference	
<b>Contact Name</b>	Bill Hurwitch, Project Director
<b>Business Address</b>	Maine Department of Education 23 State House Station Augusta, ME 04333
<b>Telephone Number</b>	(207) 624-6816
<b>Fax Number</b>	(207) 624-6791
<b>E-mail Address</b>	bill.hurwitch@maine.gov

Wyoming Department of Education	
<b>Name of Project</b>	Wyoming Department of Education (on-going)
<b>Project Scope</b>	<p>This project was also a project that came about from the Federal longitudinal data system (LDS) grants. One of the key projects was to implement an enterprise education portal and security solution information dissemination and application integration.</p> <p>Size of Account: 2 onsite, 4 offsite</p>
<b>Project Narrative</b>	Began as an enterprise portal and security project and has expanded to various data reporting and data management solutions.
<b>Specific Deliverables</b>	<p>Here is a short outline of the solutions Choice Solutions has or is currently implementing for the state of Wyoming:</p> <ul style="list-style-type: none"> <li>• Design, implement, and integrate an enterprise education portal</li> <li>• Implement state registration system to manage unique student and staff IDs</li> <li>• Design and develop reporting infrastructure using Microsoft BI</li> <li>• Implement at-risk early warning system</li> <li>• Implement statewide education identity management solution</li> </ul>

	supported by our Enterprise Directory Manager <ul style="list-style-type: none"> <li>Develop community sites around assessment data</li> </ul>
<b>Start/End Date</b>	2007 - present
<b>Web site for viewing</b>	<a href="http://fusion.edu.wyoming.gov">http://fusion.edu.wyoming.gov</a>
<b>Additional Comments:</b>	
As part of the Wyoming team, Choice Solutions implemented a statewide education identity management solution.	
<b>Reference</b>	
Contact Name	Meredith Bickell, Supervisor, Technical Services
Business Address	Wyoming Department of Education 2300 Capitol Avenue Hathaway Building, 2nd Floor Cheyenne, WY 82002
Telephone Number	(307) 777-3510
Fax Number	(307) 777-6234
E-mail Address	mbicke@educ.state.wy.us

Additionally, we have implemented or are implementing solutions in the following SEAs and LEAs:

Washington Office of Superintendent of Public Instruction	
<b>Solutions Implemented</b>	<ul style="list-style-type: none"> <li>edFusion™ Warehouse</li> <li>edFusion™ Enterprise Reporting infrastructure including Snapshots, Data Tables, Analysis, Balanced Score Cards, and Research Data Marts</li> <li>edFusion™ Directory and Identity Manager</li> <li>edFusion™ Data Insight Portal</li> </ul>

Connecticut Department of Education	
<b>Solutions Implemented</b>	<ul style="list-style-type: none"> <li>edFusion™ Directory and Identity Manager</li> <li>Identity Management solution with state Novel eDirectory</li> <li>edFusion™ Enterprise Reporting infrastructure, including NCLB reports</li> <li>edFusion™ Enterprise Portal</li> <li>State wide pre-K information system</li> <li>Various data collection and management systems</li> <li>edFusion™ State Registration System to manage unique student and staff IDs</li> </ul>

Virgin Islands Department of Education	
Solutions Implemented	<ul style="list-style-type: none"> <li>• System security infrastructure</li> <li>• Data quality procedures</li> <li>• NCLB Report Card Application which provides self service approval mechanism for all state, district, and school report cards</li> </ul>

Iowa Department of Education	
Solutions Implemented	<ul style="list-style-type: none"> <li>• edFusion™ Directory and Identity Manager</li> <li>• edFusion™ Enterprise Portal</li> <li>• Single Sign-On to various applications via SharePoint</li> </ul>

Illinois State Board of Education	
Solutions Implemented	<ul style="list-style-type: none"> <li>• edFusion™ Data Warehouse</li> <li>• edFusion™ Business Intelligence infrastructure</li> <li>• edFusion™ Directory and Identity Manager</li> </ul>

Utah State Office of Education	
Solutions Implemented	<ul style="list-style-type: none"> <li>• Student record exchange ODS</li> <li>• Self-service portal for users</li> <li>• District facing data collection utilities</li> </ul>

Boston Public Schools and Center for Collaborative Education	
Solutions Implemented	<ul style="list-style-type: none"> <li>• Features an advanced analytics dashboard</li> <li>• Includes intervention assignment and monitoring</li> <li>• Allows for collaboration on identified issues</li> <li>• Features alerts and notifications based on data driven events</li> </ul>